

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

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Post-Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building**.

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

The Pew Charitable Trusts

Private Sponsor(s) (list all):

Travel date(s): September 10-12, 2021

Name of accompanying family member (if any):

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	Total \$475 Train \$230 Bus \$125 Ferry \$120	Total \$572 (\$286/night x 2)	Total \$228 (\$76/day x 3)	
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): Agenda attached

9/23/21
(Date)

Marga Linotte (Marti) Pasternak
(Printed name of traveler)

[Signature]
(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

9/23/21
(Date)

[Signature]
(Signature of Supervising Senator/Officer)

Date/Time Stamp:

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics** in SH-220. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

ETHIC AUG10*21AM 9:30

Name of Traveler: Marga Linotte (Marli) PasternakEmploying Office/Committee: Senator Ben CardinPrivate Sponsor(s) (list all): The Pew Charitable TrustsTravel date(s): September 10-12, 2021*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*Destination(s): New York, NY

Explain how this trip is specifically connected to the traveler's official or representational duties:

This bipartisan policy and training conference will help to improve the legislative process and facilitate communication. It allows us to share best practices for managing a Senate office. Further, part of my duties are working with Chris Lynch, Senator Cardin's Chief who is Co-Chair of the group, to facilitate his work with the other chiefs. Attending this conference with the Chiefs will help me do my job better.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

8/5/21

(Date)



(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

Benjamin L CardinMarga Linotte (Marli) PasternakI, _____ hereby authorize _____
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

8/5/21

(Date)



(Signature of Supervising Senator/Officer)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): The Pew Charitable Trusts
2. Description of the trip: Bipartisan Senate Chiefs of Staff Conference
3. Dates of travel: 9/10/2021 - 9/12/2021
4. Place of travel: New York, NY
5. Name and title of Senate invitees: Chiefs of Staff (see attached list)
6. I *certify* that the trip fits one of the following categories:
☐ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
- OR -
☒ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- AND -
☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
- AND -
☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

see attachment

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
18:J Good Faith estimate	\$475 total:	\$286/night \$572 total	\$228 (\$76/day)	none
D Actual Amounts	(\$230/ Amtrak roundtrip \$125.00 - coach bus in NYC \$120 - ferry to and from Ellis Island)			

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation **or** b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip has been arranged specifically with regard to congressional participation

18. Reason for selecting the location of the event or trip

New York was selected, as the weekend coincides with the 20th anniversary of the 9/11 terrorist attacks.

19. Name and location of hotel or other lodging facility:

New York Marriott Downtown

20. Reason(s) for selecting hotel or other lodging facility:

New York Marriott Downtown can provide the necessary meeting space for the planned seminars, is

located in proximity to 9/11 Memorial & Museum and can provide the required number of guest rooms to

accommodate the group

Addendum to Private Sponsor Travel Certification Form, The Pew Charitable Trusts Management and
Leadership Conference, September 10-12, 2021

New York, NY

1-10. See form

11. See attachment

12. See form

13. Through both its information and advocacy work, The Pew Charitable Trusts seeks to inform and advance the development of sound public policy in the United States, as well as to strengthen the institutions that form the foundations of our democracy. A major component of this ongoing strategy has been to help create an environment in which policy makers can productively deliberate important issues of the day. The purpose of the conference is to provide a collaborative environment for the chiefs of staff to learn from experts and discuss issues of importance to an effective legislative process.

14. The Pew Charitable Trusts has directly sponsored congressional travel. This will be the eighth Senate Chiefs of Staff conference hosted by Pew (2007, 2009, 2011, 2014, 2015, 2017, 2019). In the past, The Pew Charitable Trusts has also funded other institutions via grants to conduct their educational programs and some of these programs may have included congressional travel.

15. The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations and concerned citizens who share our commitment to fact-based solutions and goal-driven investments to improve society. Pew issues dozens of research reports each year to educate the public and policy makers. Pew also sponsors convenings of researchers and experts to examine various issues of public policy and civic life.

16-25. See form.

[View in web browser](#)

Bipartisan Senate Chiefs of Staff Conference

The Pew Charitable Trusts

**Invites You and Your Spouse/Significant
Other
To the 8th Biennial**

Senate Chiefs of Staff Management and Leadership Conference

New York City
September 10-12, 2021

The Pew Charitable Trusts will host a conference for the Senate Chiefs of Staff from September 10-12, 2021, in New York City. It promises to be an engaging and informative weekend where you can learn from some of the most interesting speakers on management, leadership and civility today. A copy of the agenda is [available here](#).

We will depart from Union Station on Friday, September 10 on a private rail car and return on Sunday, September 12. Chiefs' expenses (minus alcohol and entertainment) are covered by The Pew Charitable Trusts. If you wish to invite your spouse, you may reimburse Pew for those expenses (estimated to be at least \$800 due to cost of needed travel during this weekend in NYC) after the

conference.

Your pre-travel paperwork should be received by the Select Committee on Ethics, 220 Hart, by Monday, August 9, 2021 to ensure processing by the legal deadline. The Committee is very strict about their deadlines and will bar attendance by staff who submit late. For that reason, *we recommend you complete and submit immediately even if you're not sure you'll attend* as there is no penalty if you're approved but later decide you can't attend (other than we need to know as soon as possible if you change your mind). [Click here to download the paperwork.](#)



If you are unable to attend, please [click here](#)

We look forward to seeing you in New York City this fall!

Tamera Luzzatto
Senior Vice President, Government Relations
The Pew Charitable Trusts
tluzzatto@pewtrusts.org
(202) 540-6501

The Pew Charitable Trusts makes every effort to comply with federal, state, and local government ethics rules, including when hosting events. Please make sure that your participation is consistent with applicable ethics rules.

This email was sent to marli_pasternak@cardin.senate.gov

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Bipartisan Senate Chiefs of Staff Conference

New York City | September 10-12, 2021



Friday, September 10, 2021

- 9:30am Attendees unable to obtain COVID testing through the Office of Attending Physician (OAP) or obtain a test within 72 hours of departure arrive at Union Station, Gate G, for COVID testing
(Senate Staff who can be tested at the OAP should do so within 72 hours of departure; we will only have tests for non-staff)
- 10:00am Attendees who have obtained a COVID test within 72 hours of departure check in at Union Station, Gate G.
Grab and go box lunches and beverages provided during check in.
- 11:05am Depart for NYC via Amtrak 84
- 2:33pm Arrive New York City, Penn Station/Moynihan Hall
Board buses based on last name, as marked
- 3:30pm Check in to Marriott Downtown
85 West Street at Albany Street
- 4:50pm Meet in Hotel Lobby for Transportation to Gracie Mansion
- 6:00-8:00pm **Reception at Gracie Mansion Hosted by Mayor Bill de Blasio**
Mayor de Blasio will share reflections on the 9/11 attacks and the nation's largest city's approach to recovery from the effects of the COVID-19 pandemic on the city's economy and its citizens' health.

Saturday, September 11, 2021

- 7:30-9:30am Breakfast at your leisure, Marriott Downtown Hotel
Financial Ballroom, Second Floor
- 8:30-9:45am **Reading of the Names of 9/11 Victims**
Moments of Silence at 8:46 and 9:03
Broadcast in the Breakfast Room
- 10:00-11:30am **Panel Discussion on Federal Recovery Support After 9/11**
As discussion of legislation for COVID recovery continues, panelists involved in the federal government's response to 9/11 will discuss their experiences. Tamera Luzzatto - moderator (The Pew Charitable Trusts, formerly Senator Clinton's Chief of Staff), Moderator; Polly Trottenberg (former Senator Schumer Staff), Jim Mazzaella (former Governor Pataki staff), and Glen Caplin (formerly Senator Gillibrand's staff).

8:30 Sharp	9/11 Memorial Museum opens early for our group , which will be greeted at 8:30 by Museum President & CEO Alice Greenwald and Kevin Sheekey, Global Head of External Relations at Bloomberg LP, representing Museum Board Chair Hon. Michael Bloomberg
8:30– 9:30am	Visit to the 9/11 Memorial Museum. For more information on what the group will see on the descent to bedrock: https://911memorial.org/visit/museum/about-museum For more on exhibitions: https://911memorial.org/visit/museum/exhibitions Given time constraints, the museum recommends the group visit the Memoriam exhibition. Finally, there is a names registry where individuals can search for victims from their respective states. You may wish to visit the names on the Memorial Saturday night, and use this tool to locate names geographically: https://names.911memorial.org/
9:30 am	Depart 9/11 Museum for Marriott Downtown Hotel
9:35 am	Depart Hotel for IAC Building, 555 West 18 th Street
10:00am-11:00am	Lessons Learned During COVID-19: Small Business Owners Asahi Pompey, Global Head of Corporate Engagement, Goldman Sachs (moderator); Louis DeCuzzi, Founder & President, Dirt Road Riding USA (Brunswick, OH); Jessica Johnson-Cope, President, Johnson Security Bureau Inc., Bronx, NY; Margueritte Ramos, Owner, ShadeFLA (Miami); Brent Reaves, President, Smokey John's Bar-B-Que (Dallas).
11:00am-12:00pm	Lessons Learned During COVID-19: Corporations and Philanthropy Kathryn Wylde, President of the non-profit Partnership for New York City (moderator); Darren Walker, President, Ford Foundation; Jonathan D. Gray, President, Blackstone; David Chubak, CEO of US Retail Banking, Citi; Joey Levin, CEO, IAC (formerly InterActive Corp).
12:00pm-12:30pm	Presentation by Barry Diller, Chairman, Expedia and IAC (formerly InterActive Corp.); and Diane von Furstenberg, Chairman, Diane von Furstenberg Studio These prominent civic leaders will welcome the group, discuss their experience as NY employers since 9/11 and specifically their work developing Little Island, HighLine, and other civic ventures including efforts to rejuvenate NYC theatre post-Covid.
12:30pm–2:00pm	Walk to Little Island Picnic lunch.
2:15pm-2:45pm	Transportation to Penn Station
4:05pm	Depart Penn Station/Moynihan Hall for Washington via Amtrak 189 Snacks and beverages provided on board
7:35pm	Arrive Union Station Washington, DC

Bipartisan Senate Chiefs of Staff Conference September 10-12, 2021

List of Invited Staff

First	Last	Senator	State
Steve	Abbott	Sen. Collins	ME
Michelle	Altman	Sen. Lankford	OK
Abby	Atkins	Sen. Wicker	MS
Rebecca	Avitia	Sen. Heinrich	NM
Allyson	Bell	Sen. Lee	UT
Rey	Benitez	Sen. Ossoff	GA
Sarah	Benzing	Sen. Brown	OH
Stephen	Boyd	Sen. Tuberville	AL
Dan	Brandt	Sen. Toomey	PA
Joel	Brubaker	Sen. Capito	WV
Jami	Burgess	Sen. Cantwell	WA
Larry	Burton	Sen. Sullivan	AK
Neil	Campbell	Sen. Reed	RI
Craig	Carbone	Sen. Rick Scott	FL
Terry	Carmack	Sen. McConnell	KY
Steve	Chartan	Sen. Cruz	TX
Kyle	Chase	Sen. Rounds	SD
Dara	Cohen	Sen. Rosen	NV
John	Connell	Sen. Young	IN
Kathleen	Connery Dawe	Sen. King	ME
Doug	Coutts	Sen. Cotton	AR
Jen	Cox	Sen. Kelly	AZ
Aaron	Cummings	Sen. Grassley	IA
Doug	Davis	Sen. Hyde-Smith	MS
Jennifer	DeCasper	Sen. Tim Scott	SC
Watson	Donald	Sen. Shelby	AL
Jon	Donenberg	Sen. Warren	MA
JP	Dowd	Sen. Leahy	VT
Veronica	Duron	Sen. Booker	NJ
Tony	Eberhard	Sen. Hoeven	ND
Eric	Einhorn	Sen. Schatz	HI
Scott	Fairchild	Sen. Cortez Masto	NV
Elizabeth	Falcone	Sen. Warner	VA
Sean	Farrell	Sen. Blackburn	TN
Jess	Fassler	Sen. Gillibrand	NY
Kaleb	Froehlich	Sen. Murkowski	AK
Kristen	Gentile	Sen. Casey	PA
Lisa	Goeas	Sen. Ernst	IA
Marc	Goldberg	Sen. Hassan	NH
David	Grannis	Sen. Feinstein	CA
Mark	Gruman	Sen. Cramer	ND

Bipartisan Senate Chiefs of Staff Conference September 10-12, 2021

List of Invited Staff

Coti	Haia	Sen. Hirono	HI
William	Henderson	Sen. Paul	KY
Mike	Henry	Sen. Kaine	VA
Allison	Herwitt	Sen. Murphy	CT
Natasha	Hickman	Sen. Burr	NC
Toni-Marie	Higgins	Sen. Boozman	AR
Luke	Holland	Sen. Inhofe	OK
Beth	Jafari	Sen. Cornyn	TX
Liz	Johnson	Sen. Romney	UT
Meg	Joseph	Sen. Sinema	AZ
Josh	Karetny (acting)	Sen. Whitehouse	RI
Joshua	Kelley	Sen. Braun	IN
James	Kelly	Sen. Moran	KS
Joel	Kelsey	Sen. Blumenthal	CT
Lindsey	Kerr	Sen. Klobuchar	MN
Chad	Kreikemeier	Sen. Shaheen	NH
Dan	Kunsman	Sen. Barrasso	WY
Dylan	Laslovich	Sen. Tester	MT
Ted	Lehman	Sen. Tillis	NC
Emily	Leviner	Sen. Fischer	NE
Mark	Libell	Sen. Warnock	GA
Mindi	Linguist	Sen. Murray	WA
Jeff	Lomonaco	Sen. Smith	MN
Chris	Lynch	Sen. Cardin	MD
Mike	Lynch	Sen. Schumer	NY
Stacy	McBride	Sen. Blunt	MO
Kirtan	Mehta	Sen. Hickenlooper	CO
Jeff	Michels	Sen. Wyden	OR
David	Montes	Sen. Padilla	CA
Mike	Needham	Sen. Rubio	FL
Ryan	Nelson	Sen. Thune	SD
Marli	Pasternak	Sen. Cardin	MD
Richard	Perry	Sen. Graham	SC
Kyle	Plotkin	Sen. Hawley	MO
James	Quinn	Sen. Cassidy	LA
John	Rader	Sen. Hagerty	TN
Misty	Rebik	Sen. Sanders	VT
Ken	Reidy	Sen. Baldwin	WI
Michelle	Richardson	Sen. Wicker	MS
Sean	Riley	Sen. Johnson	WI
Brent	Robertson	Sen. Marshall	KS
Nick	Rossi	Sen. Thune	SD

Bipartisan Senate Chiefs of Staff Conference September 10-12, 2021

List of Invited Staff

Tricia	Russell	Sen. Van Hollen	MD
Carlos	Sanchez	Sen. Lujan	NM
Ray	Sass	Sen. Sasse	NE
Rob	Skjonsberg	Sen. Rounds	SD
Jess	Smith	Sen. Bennet	CO
Kevin	Smith	Sen. Portman	OH
Sharon	Soderstrom	Sen. McConnell	KY
Patrick	Souders	Sen. Durbin	IL
Emily	Spain	Sen. Carper	DE
Jonathan	Stahler	Sen. Coons	DE
Caitlyn	Stephenson	Sen. Peters	MI
David	Stokes	Sen. Kennedy	LA
Jason	Thielman	Sen. Daines	MT
Kalina	Thompson	Sen. Duckworth	IL
Jason	Tuber	Sen. Menendez	NJ
Matt	VanKuiken	Sen. Stabenow	MI
Erin	Vaughn	Sen. Schumer	NY
Kristin	Walker	Sen. Lummis	WY
John	Walsh	Sen. Markey	MA
Lance	West	Sen. Manchin	WV
Susan	Wheeler	Sen. Crapo	ID
Ryan	White	Sen. Risch	ID
Alan	Yamamoto	Sen. Hirono	HI
Michael	Zamore	Sen. Merkley	OR